

PREPARING A BUSINESS CASE FOR INTERPRETATION

What is the Purpose of the Business Case?

A business case outlines the rationale for undertaking a project or initiative and provides evidence that the project or initiative is a good investment for both the decision maker/funding body and the community. It is intended to sell the project or initiative to the decision maker/funding body.

The business case is the one place where all relevant facts are documented and linked together into a cohesive story. This story tells people about the what, when, where, how and why.

- Why the project is needed (issues & opportunities).
- How the effort will solve the issues or opportunity facing the organization.
- What is the recommended solution(s)?
- How the solution addresses the issues or opportunities (benefits).
- What will happen if the recommended solution is not undertaken (the “do nothing” scenario).
- When the solution will be deployed.
- How much money, people, and time will be needed to deliver the solution and realize the benefits.

Preparing a Business Case

While the business case may be presented in various formats, there are certain elements to include in any written document. Your business case will be effective if you keep the following in mind:

- Make it interesting; remember someone will have to read it.
- Keep it clear and concise.
- Minimize jargon and conjecture. For example, do not use an acronym unless it has been explained elsewhere in the document.
- Communicate all facts as part of the overall story; demonstrate that you have been thorough in your research.
- Provide the reader with a picture or vision of the end state.
- Demonstrate the value the project brings to the organization and to the client and describe how it is a good financial investment.

Below are the elements of a business case. The business case outline can be adapted to be appropriate to your context. For moral support and to strengthen your argument, you may consider preparing the business case collaboratively with other colleagues who are also interested in addressing language barriers experienced in service delivery

Summary

This is your first and most important selling tool. It is where you create the critical first impression of the project, so it is important to summarize the most important elements of the project in a concise and compelling manner.

Guidelines for writing the summary include:

- Describe the project precisely and concisely, avoiding excess descriptive words.
- Include only the most essential information.
- Tell why the project is necessary, and why it is the best solution.

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- Outline the most important benefits of the project to the clients and/or community.
- Outline the costs and major disadvantages, if any.
- Summarize the most important reasons for recommending the project.
- Limit to one to two pages in length.
- Write it after the business case is completed or it will be inconsistent.

The Summary is placed first for convenience. It should stand alone as a piece of writing and force both the writer and reader to focus on what is most important about the project and hence to consolidate the overall picture.

Assessment of Need

This section presents and analyzes the problem and explains why the problem needs to be corrected. It provides the information needed to determine whether the project/initiative should be undertaken at all. This section needs to answer the following questions:

- What is the problem?
- Why does it exist?
- Who is affected?
- What is the extent of the problem?
- What is the damage (liability) if the problem is not fixed?
- What are the benefits from correcting the problem?
 - Quality
 - Access
 - Short and long term savings/return on investment.

To find this information you may need to look for information both within and outside your organization. Possible information sources include:

- Organizational studies regarding to barriers to access for clients/service users
- Organizational data regarding service users' language of origin; % of clients who do not speak English, etc.
- Neighbourhood statistics regarding % of the population that does not speak English
- Neighbourhood needs assessments and other studies

Objective

Objectives are the envisaged outcome of the proposed project/initiative; they:

- Quantify the realistically achievable outcomes of the proposed solution to the problem
- Are set in the future and assume the project's successful implementation
- Are not concerned with details of implementation

State the objectives clearly; one short statement for each, without accompanying arguments or documentation. The objectives should be Specific, Measurable, Achievable, Realistic and Timely (S.M.A.R.T.). These define the results expected as a direct consequence of the project's completion.

Objectives may include such items as:

- Improved services; enhanced service quality;
- Fewer mistakes, errors;
- Improved access to services, and
- Improved client/service user outcomes.

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Performance measures evaluate the success of the project/initiative. They indicate how the project will meet the objectives by identifying the evaluation criteria for each objective and outlining how or/and by whom each objective will be evaluated.

The Proposal

This section identifies the option you have chosen to address the problem described in the assessment of need. The section should not restate the problem or go into the operational details of method, timescale etc.

This section will include:

- Options that were considered to address the need;
- Analysis of the benefits and costs of each solution;
- Description of the selected option/solution;
- Risks of not proceeding with the proposed solution;
- Benefits of proceeding with the solution
- What innovation or innovative technologies exist in the proposed solution, and
- Risks involved with proceeding with the proposed solution.

Project Work Plan

An important step when creating a Business Case is to convince the decision maker/funding body that you have thought through the plan for implementation of the proposed solution. You can do this by developing a project work plan to describe in detail how the project will be initiated, planned, executed and closed effectively.

The work plan spells out how long the project / initiative will take and includes details regarding the project activities as well as associated milestones and timelines. The work plan should also identify any partners who are interested in contributing significantly to the project. Partners may include:

- Another service provider that is interested in addressing organizational language barriers
- Your sector/professional association

Financial Plan

The financial plan gives an explanation of why program funding is necessary and how funds will be used in the introductory paragraph. Elements of a financial plan include:

- Detailed budget;
- Sources of funding (donations, partners, grants, etc.);
- In-kind (non-cash) contributions, and
- Operating and administrative costs.

Appendix

Include your supporting documents as appendices to demonstrate their validity to the project and the due diligence undertaken in preparing the business case.

By creating a complete business case such as the one described here, the decision maker/funding body will know that you have thought through the entire project thoroughly. They will be confident the project has been well planned, will provide the expected return and is in the best interests of the community.

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